

Division of Technology Services DEVELOPMENT AND APPLICATION SUPPORT

Comprehensive Survey Tool

Provider User Guide for DDRS

Table of Contents

1.0	Introduction - The Comprehensive Survey Tool	4
1.1.	1. Product Support	4
1.2.	2. How to Obtain a Provider Representative Login	4
1.3.	3. Product Comments or Feedback	4
2.0	Overview – Reviewing and Entering a Corrective Action Plan (CAP)	5
2.1	1 Viewing Survey Findings	6
2.2	2 Search Option to Find a Survey	8
2.3	3 The Findings Link	
2.4	4 List of Findings	11
2.5	5 View CAP Link	12
2.6	6 CAP Details Screen	13
2.7	7 Findings Screen	15
3.0	Uploading and Viewing Documents	16
3.1	1 Upload a Document	16
3.2	2 View an Uploaded Document	23
3.3	3 Delete an Uploaded Document	24
4.0	Overview – (Case Manager) Working with Submitted CAPs	26
4.1	1 Review CAPs (Case Manager/Provider Representative)	27
4.2	2 Use the Search Option to Find a Survey	28
4.3	3 The Findings Link	30
4.4	4 List of Findings	31
4.5	5 Enter Case Manager Notes	33
4.6	6 Email a CAP	34
Table	e of Figures	36

Introduction - The Comprehensive Survey Tool

1.0 Introduction – The Comprehensive Survey Tool

The Comprehensive Survey Tool (CST) is a Web-based tool that you can use to:

- Review survey findings.
- Enter a Corrective Action Plan (CAP).
- Upload and view documents.
- Work with a submitted CAP.

1.1. Product Support

Use of the CST requires that you possess a unique login username and password that is assigned to you by the Provider Representative for your organization. If you encounter an issue regarding the login process, contact this individual.

After login, if you encounter a problem with this product, or if you have a question or recommendation regarding this user guide, contact the Development and Application Support (DAS) Help Desk team at:

DTS-DAS@fssa.IN.gov

A member of the DAS Help Desk team will contact you to address the issue.

1.2. How to Obtain a Provider Representative Login

If you are the Provider Representative for an organization and you need a user name and password, contact the DAS Help Desk team at:

DTS-DAS@fssa.IN.gov

A member of the DAS Help Desk team will send you the user name and password information.

1.3. Product Comments or Feedback

Providers are encouraged to send feedback on the automated CST to:

B2ISHelp@fssa.in.gov

Latest Revision: 4/21/2010

Overview - Reviewing and Entering a Corrective Action Plan (CAP)

2.0 Overview - Reviewing and Entering a Corrective Action Plan (CAP)

- 1. Navigate to the Provider Website at https://ddrsprovider.fssa.in.gov/BDDS/.
- 2. Log in by using your username and password.
- 3. Click the **Survey List** link under the **CST** menu on the left side of the screen.
- 4. Search for the survey by using the search option or pick the survey from the list of surveys.
- 5. Click **Findings** next to a survey that contains **New** in the **Status** column. The system displays a list of findings.
- 6. Locate the finding you want to view from the list.
- 7. Click the **View** hyperlink under the **CAP** column next to the finding you want to view.
- 8. Complete the information in the **For Provider Only** section of the screen (all fields are required).
- 9. Click the **Save** button to save what's been entered without submitting the CAP.
- 10. Click the **Submit** button to submit the CAP.

Viewing Survey Findings

2.1 Viewing Survey Findings

This section of the *Provider CST User Guide for DDRS* describes how to view survey findings.

Navigate to the Provider Website at:

https://ddrsprovider.fssa.in.gov/BDDS/.

Log in by using your username and password.

Click on the **Survey List** link under the **CST** menu (*Figure 1*) on the left side of the screen.



State of Indiana

Division of Disability and Rehabilitati Division of Aging

Provider: SYCAMORE REHABILITATION SERVICES/HENDRIG

Home

Instructions

BDDS Links

Provider Info Interactive Budget Tool IFUR Tool

CST Survey List

Change Password Logout

mkittrel

DDRS Web-Based Tools

Instructions

To avoid the need to use scroll bars in this application resolution to 1024×768 pixels or higher. Use the foll resolution on your computer:

- Right-click on your desktop and select Properties Display Properties window appears.
- 2. Select the **Settings** tab.
- Drag the slider in the Screen resolution section the screen resolution.
- 4. Select Apply.

Figure 1 - CST Survey List Link

Latest Revision: 4/21/2010

Viewing Survey Findings

The **Survey List** screen appears, as shown in (*Figure 2*).



Figure 2 - Survey List Screen

Search Option to Find a Survey

2.2 Search Option to Find a Survey

There is a search option on the **Survey List** screen (*Figure 3*) that allows you to search for a survey based on one or more of the following pieces of information for the client:

- Last Name
- First Name
- Survey Name

For Example To locate a survey based on a client's first name and the first two letters of the client's last name, you would enter the information into the First Name field and the Last Name field.

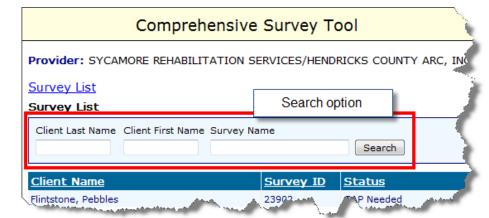


Figure 3 - Survey Search Option

Search Option to Find a Survey

Once you've entered the search criteria, click the **Search** button (*Figure 4*) to display a list of surveys that meet the search criteria (*Figure 5*).



Figure 4 – Search for a Survey

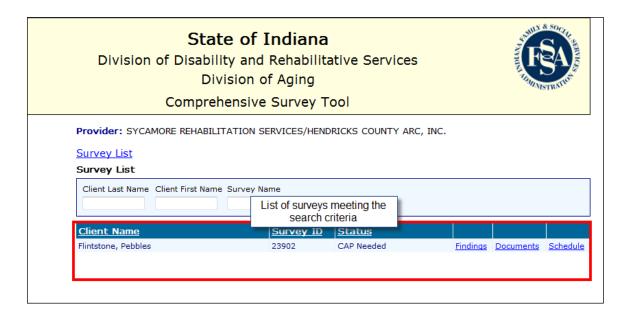


Figure 5 - List of Surveys

Latest Revision: 4/21/2010 Page 9

The Findings Link

2.3 The Findings Link

The list of surveys displays the:

- 1. Client Name
- 2. Survey ID
- 3. Survey Status



Figure 6 - Findings Link

For Example The survey Status reflects that a CAP is needed and that there are findings.

To see the findings for the survey, click the Findings hyperlink (Figure 6).

List of Findings

2.4 List of Findings

When the **List of Findings** screen opens, a list of relevant **Survey Details** is displayed just below the Provider's name (*Figure 7*).



Figure 7 - List of Survey Findings - Survey Details

View CAP Link

2.5 View CAP Link

Below the Survey Details the list of Survey Findings is displayed.

As a Provider, you can view findings for any of the providers displayed in the **Findings** window.

To enter a CAP for a finding, click the **View** link next to the finding (*Figure 8*).

Vendor ID	<u>Provider</u>	<u>Survey Name</u>	<u>Indicator</u> <u>ID</u>	<u>Finding</u> <u>Narrative</u>	<u>Service</u>	<u>Date</u> <u>CAP</u> <u>Entry</u> <u>Complete</u>	<u>Status</u>	САР
574 R	REHABILITATION	BQIS Person Centered Compliance Tool	I.A.1	Findings for test item one.	ck to view	a CAP	New	<u>View</u>
574 R	SYCAMORE REHABILITATION SERVICES/HENDRICKS COUNTY ARC INC.	BQIS Person Centered Compliance Tool	I.B.1	Findings for test item two.	FHG8		New	<u>View</u>
574 R	REHABILITATION	BQIS Person Centered Compliance Tool	I.C.1.	Findings for test item three.	FHG8		New	<u>View</u>

Figure 8 - List of Survey Findings - View Link

2.6 CAP Details Screen



Figure 9 - CAP Details Screen

The upper portion of the CAP Details screen (Figure 9) displays the following fields:

Survey ID

- Provider
- Indicator ID
- CAP Status

Date Accepted

- Survey Name
- Vendor ID
- Survey Question
- Date CAP Entry Complete
- Date Denied

Client name

- Service
- Finding Narrative
- Date CAP Locked

Denied Reason

Latest Revision: 4/21/2010

CAP Details Screen

Beneath this section of the screen is the **For Provider Only** section (*Figure 10*). This area is where the provider enters all the elements of the CAP. To enter information into a field, click in the field with your mouse.



Figure 10 - Enter CAP in For Provider Only Section

Click the **Save** button to save what's been entered without submitting the CAP.

Click the **Submit** button to submit the CAP.



Figure 11 - CAP Details Screen - Save and Submit Buttons

Latest Revision: 4/21/2010 Page 14

Findings Screen

2.7 Findings Screen

Once the CAP has been submitted, the status on the **Findings** screen will change from **New** to **Submitted** with the date that the CAP was submitted (*Figure 12*).

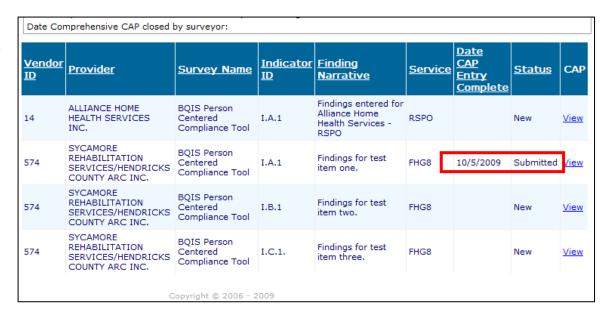


Figure 12 - Findings Screen with CAP Submitted Status

3.0 Uploading and Viewing Documents

Providers have the ability to upload documents to the CST system via the Provider Website.

3.1 Upload a Document

To upload a document, the provider navigates to the <u>Survey List</u>.

Once the **Survey List** appears, click on the **Documents** link (*Figure 13*) to view or upload documents to the Provider Website.



Figure 13 - Documents Link

To upload a document click the **Upload document** button (*Figure 14*) to display the **Document Upload** window (*Figure 15*).

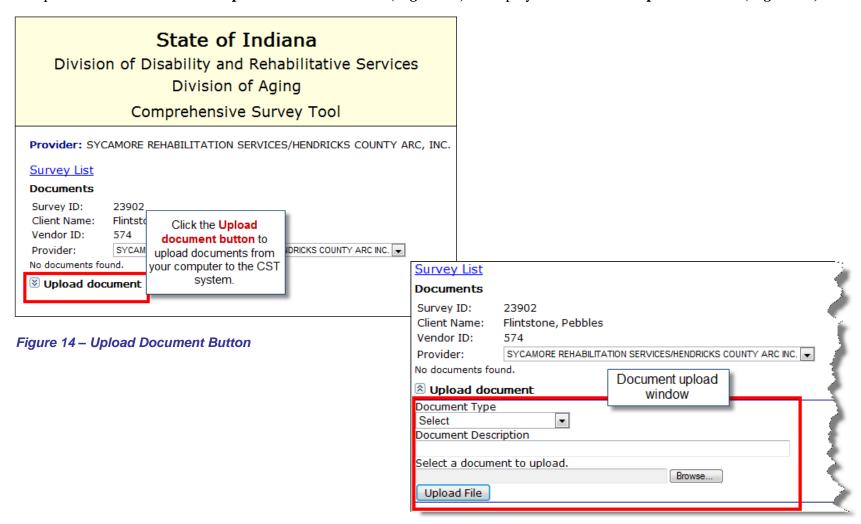


Figure 15 - Document Upload Window

Latest Revision: 4/21/2010

Select a document type from the drop-down menu (*Figure 16*).

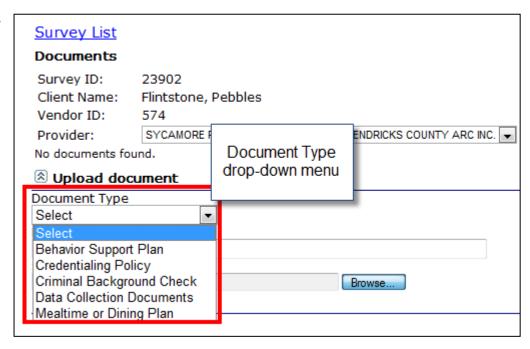


Figure 16 - Document Type Drop-down Menu

Type a description of the document in the **Document Description** field (*Figure 17*).

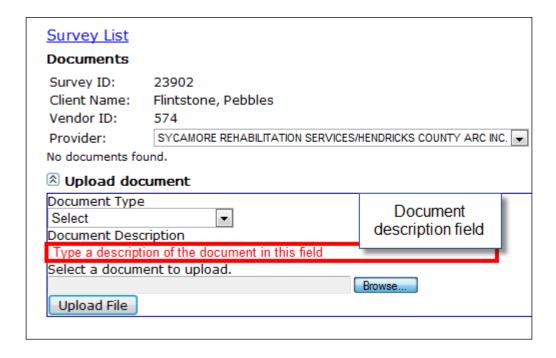


Figure 17 - Document Description Field

Select the **Browse** button to open the **Choose File** window (*Figure 18*).

Use the **Choose File** window to locate and select a document on your computer to upload to the CST system.

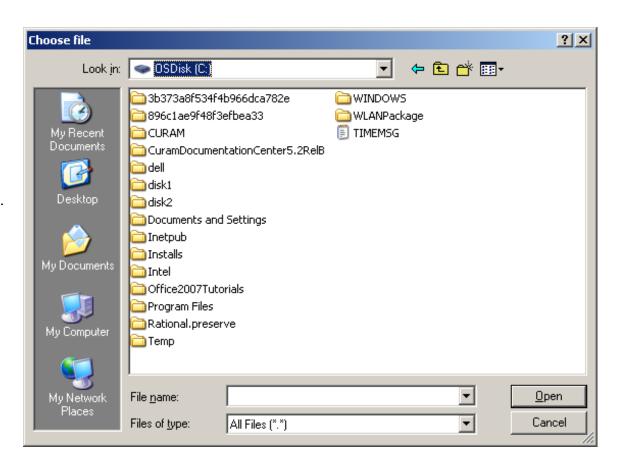


Figure 18 - Choose File Window

Once you've selected the documented to be uploaded, click the **Upload File** button (*Figure 19*).

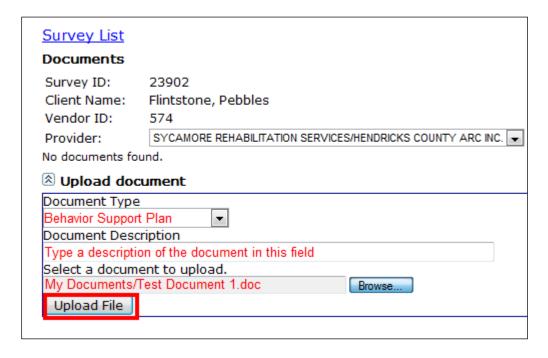


Figure 19 - Upload File Button

When the document has been successfully uploaded, it will appear in the list of uploaded documents (*Figure 20*).

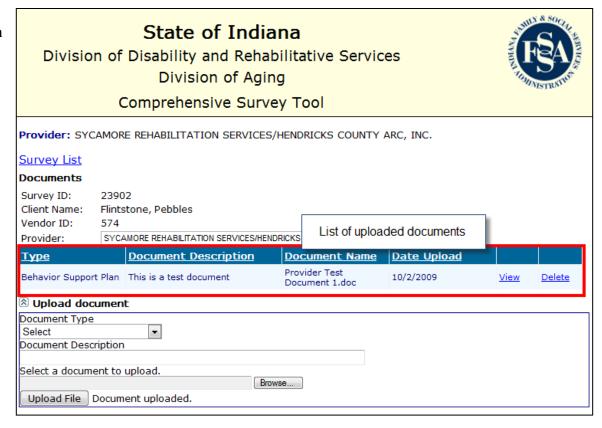


Figure 20 - List of Uploaded Documents

View an Uploaded Document

3.2 View an Uploaded Document

To view the uploaded document, click the **View** button. The **File Download** dialog box (*Figure 21*) appears asking whether you want to Open or Save the file. Click the **Open** button to open and view the document.

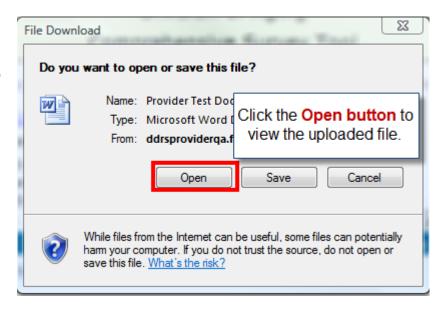


Figure 21 – File Download Dialog Box

Delete an Uploaded Document

3.3 Delete an Uploaded Document

On the List of uploaded documents screen (*Figure 22*) click the **Delete** link next to the document you wish to delete.

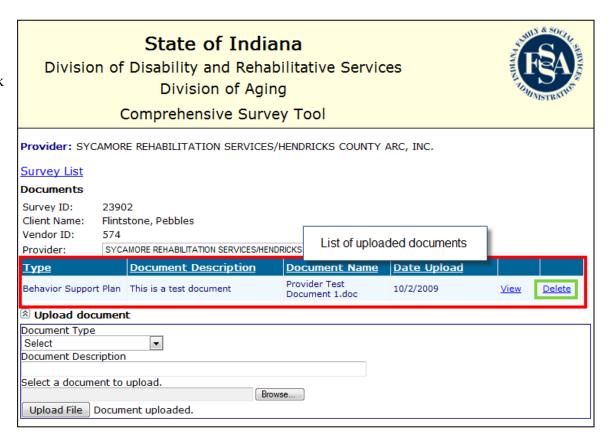


Figure 22 - List of Uploaded Documents Screen - Delete Link

Delete an Uploaded Document

A warning message (*Figure 23*) appears on the webpage. If you want to delete the document, click the **OK** button.

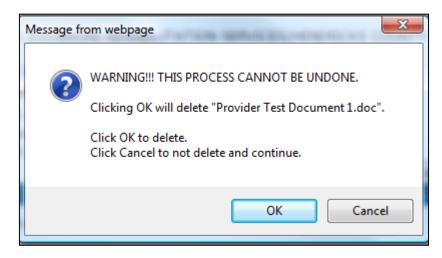


Figure 23 - Warning Message

4.0 Overview – (Case Manager) Working with Submitted CAPs

- 1. Navigate to the Provider Website at https://ddrsprovider.fssa.in.gov/BDDS/
- 2. Log in as a Case Manager by using your username and password.
- 3. Click the **Review Submitted CAPs** link under the **CST** menu on the left side of the screen.
- 4. Search for the survey by using the search option or pick the survey from the list of surveys.
- 5. Click **Findings** next to the survey whose findings you want to review. The system will display a list of findings.
- 6. Locate the finding you want to view from the list.
- 7. Click the **View** hyperlink under the **CAP** column next to the finding you want to review.
- 8. After reviewing a CAP, navigate to the **For Case Manager Only** section of the screen.
- 9. Enter one or more notes in the Case Manager Notes field.
- 10. Click the **CAP Reviewed** check box.
- 11. Click the **Save** button to save the Case Manager notes and to indicate that a Case Manager reviewed the CAP.
- 12. To e-mail the CAP, click the **Email CAP to your supervisor if required** link to open an e-mail form.
- 13. Enter the recepient's name in the **To:** field on the e-mail form.
- 14. Enter a message into the **Body:** field on the e-mail form.
- 15. Click the **Send CAP** button. The "**CAP was successfully emailed to recepient**" confirmation message appears below the E-mail form.
- 16. When the Case Manager or Provider Representative completes the review of submitted CAPs in the Survey List, click the **Submit Reviewed CCAP** button to notify the surveyor.

Review CAPs (Case Manager / Supervisor)

4.1 Review CAPs (Case Manager/Provider Representative)

Navigate to the Provider Website at https://ddrsprovider.fssa.in.gov/BDDS/.

Log in by using your Case Manager or Provider Representative username and password.

Click on the **Review Submitted CAPs** link under the **CST** menu (*Figure 24*) on the left side of the screen.

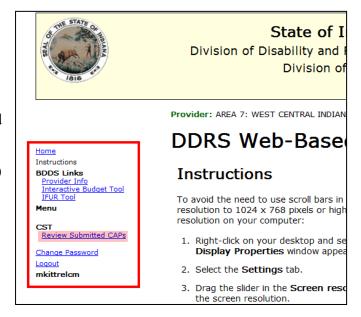


Figure 24 - Review Submitted CAPs

The Survey List screen appears (Figure 25).



Figure 25 - Survey List

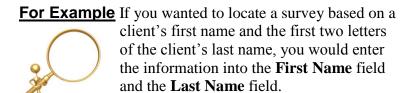
Latest Revisi 4/21/2010

Use the Search Option to Find a Survey

4.2 Use the Search Option to Find a Survey

There is a search option on the **Survey List** screen (*Figure* **26**) that allows you to search for a survey based on one or more of the following pieces of information for the client:

- Last Name
- First Name
- Survey Name



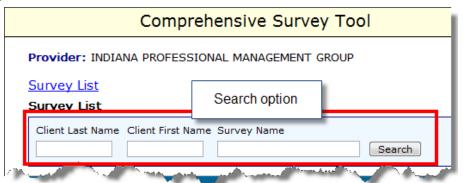


Figure 26 - Search Option

Use the Search Option to Find a Survey

Once you've entered the search criteria click the **Search** button (*Figure 27*) to display a list of surveys that meet the search criteria (*Figure 28*).

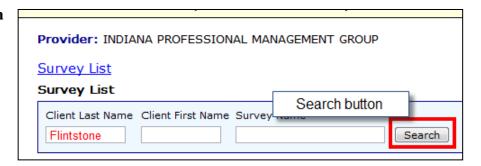


Figure 27 - Search for a Survey

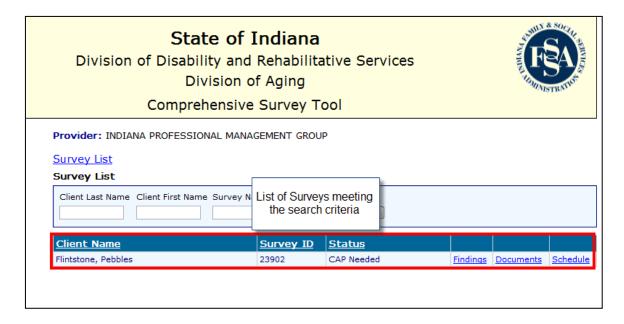


Figure 28 - List of Surveys Meeting the Search Criteria

Latest Revision: 4/21/2010 Page 29

The Findings Link

4.3 The Findings Link

The list of surveys displays the:

- Client Name
- Survey ID
- Survey Status

For Example The survey Status reflects that a CAP is needed and that there are findings. To see the findings for the survey, click the Findings hyperlink (Figure 29).



Figure 29 - Survey Status

List of Findings

4.4 List of Findings

When the **List of Findings** screen opens, a list of relevant **Survey Details** is displayed just below the Provider's name (*Figure 30*).

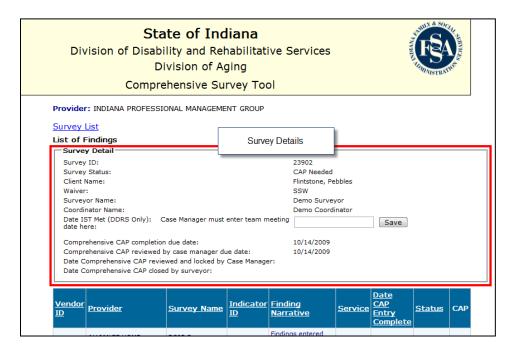


Figure 30 - Survey Details

List of Findings

Below the **Survey Details** the list of **Survey Findings** is displayed.

As a Provider, you can view findings for any of the providers displayed in the **Findings** window.

To review a CAP for a finding, click the **View** link next to the finding (*Figure 31*).

<u>Vendor</u> <u>ID</u>	<u>Provider</u>	<u>Survey Name</u>	Indicator ID	<u>Finding</u> <u>Narrative</u>	Service	<u>Date</u> CAP Entry Complete	<u>Status</u>	САР
14	ALLIANCE HOME HEALTH SERVICES INC.	BQIS Person Centered Compliance Tool	I.A.1	Findings entered for Alliance Home Health Services - RSPO	RSPO		New	<u>View</u>
574	SYCAMORE REHABILITATION SERVICES/HENDRICKS COUNTY ARC INC.	BQIS Person Centered Compliance Tool	I.A.1	Findings for tes item one.	Click to vi submitted		Submi d	<u>View</u>
574	SYCAMORE REHABILITATION SERVICES/HENDRICKS COUNTY ARC INC.	BQIS Person Centered Compliance Tool	I.B.1	Findings for test item two.	FHG8	10/5/2009	Submitted	<u>View</u>
574	SYCAMORE REHABILITATION SERVICES/HENDRICKS COUNTY ARC INC.	BQIS Person Centered Compliance Tool	I.C.1.	Findings for test item three.	FHG8		New	<u>View</u>

Figure 31 - View Link

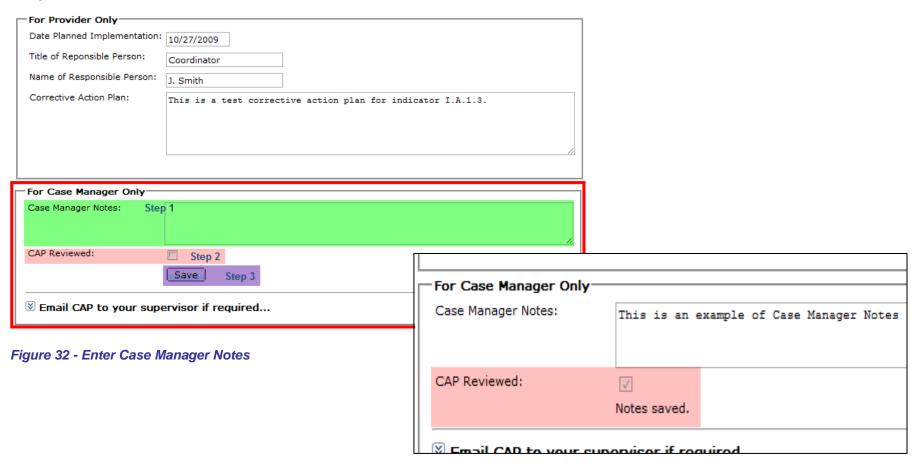
Enter Case Manager Notes

4.5 Enter Case Manager Notes

After reviewing a CAP, navigate to the For Case Manager Only section of the screen (Figure 32) to enter Case Manager notes.

Click the **CAP Reviewed** check box.

Click the **Save button** to save the Case Manager notes and add an indicator that confirms the Case Manager reviewed the CAP (*Figure 33*).



Latest Revision: 4/21/2010

Figure 33 - Case Notes Entered, CAP Reviewed and Saved

Email a CAP

4.6 Email a CAP

To e-mail the CAP with the Case manager's notes, click the **Email CAP** to your supervisor if required link to open an e-mail form.

Once the email form is displayed (*Figure 34*) enter the recepient's name in the **To:** field on the form.

Enter a message into the **Body:** field on the form.

Click the **Send CAP** button to email the CAP to the recepient.

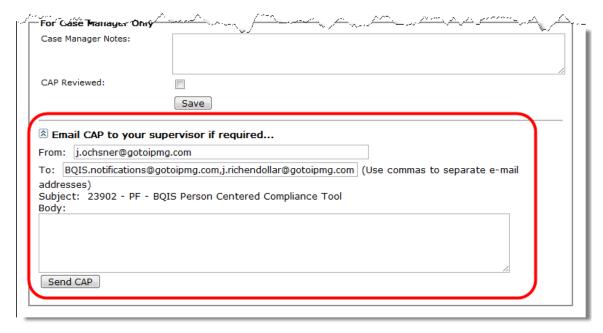


Figure 34 - Email a CAP with Case Manager Notes

Email a CAP

A **CAP** was successfully emailed to recipient confirmation message (*Figure 35*) appears below the E-mail form.



Figure 35 - CAP Email Confirmation Message

When the Case Manager or Provider Representative completes the review of submitted CAPs in the Survey List, click the **Submit_Reviewed CCAP** button (*Figure 36*) to notify the surveyor that the CAPs have been reviewed.

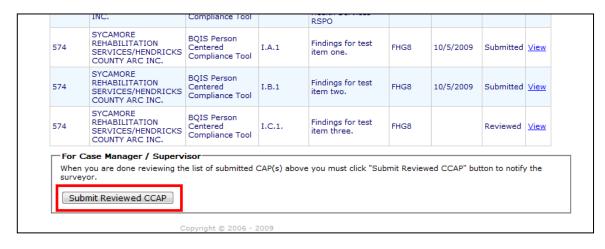


Figure 36 - Submit Reviewed CCAP

Table of Figures

Figure 1	<u>CST Survey List Link</u>
	Survey List Screen
Figure 3	Survey Search Options
Figure 4	<u>Search for a Survey</u>
Figure 5	List of Surveys
Figure 6	<u>Findings Link</u>
Figure 7	List of Survey Findings – Survey Details
Figure 8	List of Survey Findings – View Link
Figure 9	
Figure 10	Enter CAP in For Provider Only Section
Figure 11	CAP Details Screen - Save and Submit Buttons
Figure 12	Findings Screen with CAP Submitted Status
Figure 13	<u>Documents Link</u>
Figure 14	Upload Document Buttor
Figure 15	Document Upload Window
Figure 16	Document Type Drop-down Menu
Figure 17	Document Description Field
Figure 18	
Figure 19	<u>Upload File Buttor</u>
Figure 20	List of Uploaded Documents
	File Download Dialog Window
Figure 22	<u>List of Uploaded Documents Screen - Delete Link</u>
	Warning Message

Table of Figures

Figure 24	<u>Review Submitted CAPS</u>
	<u>Survey List</u>
Figure 26	Search Option
Figure 27	Search for a Survey
Figure 28	List of Surveys Meeting Search Criteria
Figure 29	Survey Status
_	Survey Details
_	View Link
_	<u>Enter Case Manager Notes</u>
_	Case Notes Entered, CAP Reviewed and Saved
_	Email a CAP with Case Manager Notes
•	
_	Submit Reviewed CCAP